

PROPOSAL

IMPACT FEE FACILITIES PLAN SERVICES

September 10, 2025

Response to RFSQ

dta



TOWN OF APPLE VALLEY

SUBMITTED BY:

Kuda Wekwete
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TOWN OF APPLE VALLEY



IMPACT FEE FACILITIES PLAN SERVICES

PROPOSAL SUBMISSION DEADLINE:

SEPTEMBER 10, 2025, AT 3:00 P.M.

Prepared for:

Town of Apple Valley

1777 North Meadowlark Dr.

Apple Valley, UT 84737

Attention: Michelle Kinney, Finance Director

Project Contact:

Kuda Wekwete

Managing Director, DTA

8117 Preston Road, Suite 300

Dallas, TX 75225

Phone: (800) 969-4DTA x204



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Ms. Michelle Kinney
Finance Director
Town of Apple Valley
1777 North Meadowlark Dr.
Apple Valley, UT 84737
E-mail: MKinney@AppleValleyUT.gov

September 9, 2025

RE: Request for Statement of Qualifications ("RFSQ") for Impact Fee Facilities Plan Services

Dear Ms. Kinney:

DTA Public Finance, Inc. ("DTA"), is pleased to submit this proposal to Town of Apple Valley (the "Town"). It is our understanding that the Town is seeking a qualified consultant(s) to prepare Impact Fee Facilities Plans ("IFFPs") for General Municipal Services and Parks and Recreation. **DTA's effort shall address both projects.** All work to be completed will satisfy the requirements of the Impact Fees Act, Title 11, Chapter 36 of the Utah Code (the "Impact Fees Act"). The Impact Fees Act-compliant Development Impact Fee ("DIF") Nexus Study ("Fee Study") would recommend the appropriate fee justification methodology and fee levels to support specific types of Town-selected capital facilities needed to serve new growth.

DTA works closely with planning, parks and recreation, and community development departments of our municipal clients nationwide, including, most recently, the City of Fayetteville (AR), Village of Oswego (IL), County of El Paso, (TX), Pickens County (SC), City of Laconia (NH), City of Delray Beach (FL), City of Plantation (FL), City of Riviera Beach (FL), Hillsborough County (FL), and Jefferson County (FL). In fact, in Utah, DTA provides public finance consulting services to seven improvement associations and special districts located from Salt Lake City to Park City, including Benloch Ranch Improvement Association Nos. 1 and 2. In 2023, DTA was hired by Pickens County, South Carolina, to perform a DIF study to evaluate and update the County's existing infrastructure impact fees. The fees reviewed and recommended in this study included County Administration, Fire, Emergency Medical Services ("EMS"), Emergency Management, Roads and Bridges, Solid Waste, Library, Parks, and Sheriff's Department. The County selected DTA to review, strategize, and implement the first DIFs in the County. A particular challenge in this fee study was that the County is in a region of the country in which both the local government and developer communities are understanding for the first time DIF programs. Fee generation is an important benefit to staff, County Council members, and the building community. **In addition, DTA is a member of the Florida Sheriff's Association and is committed to backing the State's Sheriffs and letting them know we're on the side of public safety for law enforcement and fire rescue.**



As described in greater detail in the attached proposal, DTA is a public finance consulting firm with offices in Irvine, San Jose, San Francisco, and Riverside, California, as well as Dallas and Houston, Texas, Raleigh, North Carolina, and Tampa, Florida. Since its establishment in 1985, DTA has completed consulting assignments for more than 3,000 clients in 26 states. During this period, the firm has been involved in the formation of more than 2,000 public finance districts, with total bond authorizations exceeding \$75 billion. Our financing programs have utilized a variety of public financing mechanisms, such as Special Assessment Areas ("SAAs"), Public Improvement Districts ("PIDs"), Assessment Districts ("ADs"), Community Facilities Districts ("CFDs"), Certificates of Participation, Tax Allocation Bonds, Sewer and Water Revenue Bonds, Marks-Roos Bond Pools, Landscaping and Lighting Districts ("LLDs"), Integrated Financing Districts, and various types of fee



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programs. **Notably, DTA is licensed and registered with the U.S. Securities and Exchange Commission ("SEC") and Municipal Securities Rulemaking Board ("MSRB") as a Municipal Advisor (No. 867-01160) and follows all the fiduciary requirements associated with this designation.**

Each of DTA's DIF studies includes a cost-benefit analysis and the determination of nexus between the facilities financed and financing mechanism. DTA has prepared approximately 700 fee justification studies to date for a variety of public improvements, including transportation, water, sewer and flood control facilities, fire protection districts, fire and police stations, parks, libraries, schools, and other types of infrastructure. DTA is also currently involved in impact fee engagements in Arizona, Arkansas, California, Florida, Illinois, New Hampshire, New Mexico, North Carolina, and South Carolina.

DTA has assembled a project team for the Town with the breadth of experience required to provide impact fee consulting services in a professional and timely manner. **This project would be primarily handled out of DTA's Dallas office.** I, Kuda Wekwete, a Managing Director at DTA, would be the Principal-in-Charge and have the Town's primary account responsibility. Hector Perez, a Senior Manager at DTA, and Richard Ruiz, a Manager at DTA, will serve jointly as the primary points of contact and be assisted by other support staff. Steve Runk, P.E., Vice President of Engineering Services at DTA, and David Taussig, Chairman/Managing Director, will provide engineering expertise and technical advisory services, respectively. Brief resumes for each of our team members are included in Section 2 of this proposal. All personnel will be available full-time (100%) for the duration of the project.

DTA has spent years managing growth issues for municipal clients nationwide. We understand the funding challenges to the Town with regards to resource allocation, demographic changes, and the influence of development on budgets, staff, and leadership decisions.

If you have questions regarding this proposal, please contact me by phone at (800) 969 4DTA x204 or by e-mail at Kuda@FinanceDTA.com. Thank you for the opportunity to work with the Town on this engagement.

Best Regards,

A handwritten signature in black ink, appearing to read "Kuda Wekwete", is written over a light gray horizontal line.

Kuda Wekwete
Managing Director
Phone: (800) 969-4DTA
Kuda@FinanceDTA.com

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APPENDICES

APPENDIX A SAMPLE DATA REQUEST FORM

1 APPROACH AND METHODOLOGY

DTA is pleased to submit this proposal to Town of Apple Valley (the “Town”). It is our understanding that the Town is seeking a qualified consultant(s) to prepare Impact Fee Facilities Plans (“IFFPs”) for General Municipal Services and Parks and Recreation. **DTA’s effort shall address both projects.** All work to be completed will satisfy the requirements of the Impact Fees Act, Title 11, Chapter 36 of the Utah Code (the “Impact Fees Act”). The Impact Fees Act-compliant Fee Study would recommend the appropriate fee justification methodology and fee levels to support specific types of Town-selected capital facilities needed to serve new growth. In addition to delivering Geographic Information System (“GIS”) and financial modeling support files, DTA will work and train staff to understand and implement the findings of the Fee Study.

A Project Management Services

DTA has the available capacity within its current personnel and workload to complete this Scope of Work within the proposed timeline. Key personnel will be available to the extent proposed, or designated by the Town, for the duration of the project and no person designated as “key” to the project shall be removed or replaced without the prior written concurrence of the Town. In addition, DTA is not behind schedule or past the completion date for any active projects and has a long history of delivering projects on a timely basis and adhering to agreements. In addition, there are no conflicts of interest that may exist with other clients or projects currently underway.

The DTA team provides a virtual kickoff meeting as an introduction and next steps. At the meeting, the Project Manager for the Town is identified. The team also reviews the data request form and file share process to maximize efficiency, reduce billable hours, and enhance the quality of data. Please refer to **Appendix A** for a Sample Data Request Form. The number of follow-up meetings corresponds to communication and teamwork. Site visit and in-person meeting(s) occur soon after to identify leadership, important decisions, and the timing of the project goals. The Town has regular meetings with the Project Manager and staff at DTA to maximize project flow, project understanding, and any related issues that may prompt review.

DTA has assembled an experienced and capable team with expertise in each unique element of study requested by the Town. All personnel will be available full-time (100%) for the duration of the project. As such, a key objective for this project will be to complete all tasks of the project within the agreed-upon budget and schedule. Time and time again, DTA has proven its ability to adhere to contract agreements and understand the importance of good project management. A number of key strategies employed for all of DTA’s clients are listed below.

- Reviewing prior studies and effectively managing data requests and data gathering/consolidation;
- Ensuring key stakeholder input is received prior to writing any reports, so work need not be duplicated;
- Leveraging technology to request and track information from various sources and stakeholders;

- Setting up standing conference calls (i.e., bi-weekly), in addition to scheduled meetings with Town staff in order to stay on track with tasks and deliverables and discuss critical project elements; and
- Preparing internal report drafts for Town staff review and discussion on conference call(s).

DTA utilizes the software application BQE CORE to track project expenditures. This program is always available to DTA's employees and provides detailed project information ranging from the execution of the contract to completion of the project. To manage this contract effectively in terms of team performance, schedule compliance, and budget adherence, Mr. Wekwete, DTA's Principal-in-Charge, will utilize these tools:

- Bi-weekly assignment checklists throughout the life of the contract to ensure each task remains on schedule by utilizing proper staffing assignments.
- Consistent communication with Town staff via e-mail, telephone, and in-person meetings, as needed.
- Weekly budget review to ensure no budget overruns occur. DTA's customized accounting system will enable us to track the expenditures to date each week and ensure budget compliance.
- Regular meetings with Town staff to discuss progress and any issues and receive guidance.

At DTA, all our multidisciplinary team members come from diverse backgrounds, and we put people first. We pride ourselves on developing strong relationships with our clients and working closely with them to understand the big picture and goals they want to achieve as a result of our engagement, as well as how DTA's work may impact other initiatives both now and in the future. We understand that public finance is about ensuring that communities can thrive by assessing what the best solution is for the community as a whole and what will help the community reach and sustain infrastructure growth goals.

DTA brings a practical perspective combined with real-world experience in working with municipalities, which gives us the ability to understand and communicate with all stakeholders throughout the process. Regarding our engagement approach, we will work closely with Town leadership to engage with property owners, business owners, and community leaders to understand any issues or pressure points, as well as what is envisioned for the future.

Finally, DTA will provide independent and objective work products. Our firm regularly reviews legal opinions, regulations, and statutes that impact or modify public finance-related case law. Thus, DTA is committed to providing deliverables that reflect the most current developments in public finance and real property law.

B Project Approach

DTA would provide all-inclusive professional and technical support to the Town in developing a conceptual project scope and reviewing any existing Town DIF studies related to General Plans, Specific Plans, the Comprehensive Plan, and the Capital Improvements Plan, in addition to preparing a comprehensive review of required impact fee levels documented in the formal Nexus Study prepared under the Impact Fees Act. Having been subjected to legal and developer scrutiny, DTA

has developed a streamlined approach and methodology that establishes a rational and substantial nexus between new development and the need for public facilities.

DTA's Final Report shall not address whether any current or proposed DIFs are valid under the U.S. Constitution's Fifth Amendment Takings Clause. On April 12, 2024, in *Sheetz v. County of El Dorado* (2024), the U.S. Supreme Court held that its decisions in *Nollan v. California Coastal Comm'n* (1987) 483 U.S. 825 and *Dolan v. City of Tigard* (1994) 512 U.S. 374 apply to legislatively imposed conditions on land-use permits. That said, the Supreme Court left it to the California appellate court on remand to address the validity of the traffic impact fee at issue in the case and determine how to apply *Nollan/Dolan* in this context. DTA cannot predict how courts will resolve such issues in the future and is providing no services or guarantees of any kind concerning the validity of any impact fees under the U.S. Constitution's Fifth Amendment Takings Clause.

In determining a reasonable nexus for each specific type of public facility, DTA will utilize one or more of the methodologies discussed below depending upon the data and other information available from the Town and its current infrastructure policies. All the fee methodologies employ the concept of an Equivalent Dwelling Unit ("EDU") to allocate benefit among various land use classes. EDUs are a means of quantifying different land uses in terms of their equivalence to a residential dwelling unit, where equivalence is measured in terms of potential infrastructure use or benefit from each type of public facility. For many types of facilities, EDUs are calculated based on the number of residents or employees generated by each land use class. For other facilities, different measures, such as the number of service calls, quantity of trip miles, or amount of storm water run-off, more accurately represent the benefit provided to each land use class. Transportation facilities typically demand EDU calculations predicated on a per unit or per trip basis. The three types of fee methodologies used by DTA to establish EDUs for a public facility within a typical Impact Fees Act-compliant study are based on either an existing Infrastructure Plan, a predetermined capacity amount, or a generic standard.

Plan-Based Fees: The first method of apportioning fees is based on a "Plan," such as a Master Plan of Facilities, that identifies a finite set of improvements. These Facilities Plans generally identify a finite set of facilities needed by the public agency and are developed according to assessments of facilities needs prepared by staff and/or outside consultants and adopted by the public agency's legislative body. With this plan-based approach, specific costs can be projected and assigned to all land uses planned in the future, often with a specific time period in mind that reflects new development projections. In preparing an impact fee analysis, facilities costs can be allocated in proportion to the amount of demand caused by each type of future development. It works well when it is difficult to measure the actual service needed by a land use type or where capacity cannot be directly related to demand. These plan-based fees are typically per unit assessments. This type of plan-based approach is generally preferable to the two other approaches to cost allocation listed below, but it does require the existence of a Facilities Plan, which is not always available.

Capacity-Based Fees: A second method of fee assessment is based on the "capacity" of a service or system, such as a water tank or a sewer plant. This kind of fee is not dependent on a particular Land Use Plan (i.e., amount or intensity), but rather it is based on a rate or cost per unit of capacity that can be applied to any type of development as long as the system has adequate capacity. This type of fee is useful when the costs of the facility or system are unknown at the outset, but it requires that

the amount of capacity used by a particular land use type be measurable or estimable. Capacity-based impact fees are assessed based on the demand rate per unit.

Standard-Based Fees: A third method of assessing fees is based on “standards” where costs are based on units of demand. This method establishes a generic unit cost for capacity, which is then applied to each land use per unit of demand. Parks are an excellent example of this type of fee structure. For example, a municipality may find that it currently provides five acres of parkland per thousand residents, which it may then require for all new residential development. Thus, this standard is not based on cost but rather on a standard of service. This methodology provides several advantages, including not needing to know the cost of a specific facility, identifying how much capacity or service is provided by the current system, or having to commit to a specific size of facility.

In preparing its analysis, DTA will apply one or more of these three methodologies to each facility type to generate applicable fee levels. However, the results of our quantitative analysis will be tempered by real-world factors to be at least considered by the Town prior to the adoption of revised fee levels.

C Proposed Scope of Work

DTA’s facilities assessment is done via an extensive inventory request and in-person interviews of responsible staff. DTA staff are subject matter experts and providers of the services in the study. Work products stemming from the work plan described in this section will include a memorandum (“memo”) summarizing the fee methodology options, Draft and Final Reports, and IFFPs for General Municipal Services and Parks and Recreation.

Task 1 – Development of Project Strategy and Kickoff Meeting

DTA staff will meet with Town staff in a project kickoff meeting to finalize the details of the project, deliverables, timetables, and tasks, discuss the fee methodologies and best practices, identify needed information (i.e., reports, project/needs lists, stakeholder groups, data, etc.), prepare the final schedule, discuss the public process, and resolve other concerns, as appropriate.

Task 2 – Develop Population and Dwelling Unit Projections

DTA will compile and document existing and future population, planning, and development estimates for the Town. The projections resulting from this task will ultimately calculate fee levels. At this stage, DTA will evaluate Town resources, IFFP(s), all factors affecting the existing Fee Study, and pertinent impact fee(s) as outlined by the Town.

- 2A Population Projections:** DTA will gather existing information on present and future population for the Town from various sources, including staff, the General Plan, existing Master Plans, the Comprehensive Plan, the Capital Improvements Plan, the U.S. Census, the Utah Governor’s Office of Planning and Budget (“GOPB”), any other relevant Town documents, and from other data sources, as needed.
- 2B Conduct Entitlement Research and Projections:** DTA will coordinate with Town staff to determine existing and future residential and non-residential development within the Town over the planning horizon. To complete this subtask, DTA will review the General Plan/Capital Improvements Plan and related plans to determine expected development land use patterns in the Town, assess Town records to identify existing entitlements for dwelling

units and commercial/industrial development, and project the number of new dwelling units and commercial/industrial development based on existing entitlements and population projections for the next 20 years, or such other target year as selected by Town staff.

- 2C **Review Current Town Fee Structure:** DTA shall review and summarize the Town's current development fee structures, Town policies and procedures, IFFPs, and other regulatory requirements affecting potential fee structures and revenue program requirements.
- 2D **Review Prior Town Fee Justification Studies:** DTA shall review the approach and methodology utilized in prior Town fee justification studies so they can be evaluated in light of the Town's current needs.

Task 3 – Review Facility/Capital Needs and Levels of Service

This task entails the review of the facilities and capital needs required to serve new development in the study area projected in Task 2. DTA will use existing Town materials (and any relevant reports) as base documents and focus our effort on updating this information.

For any fee program to be comprehensive in its scope, it is necessary to complete a thorough identification and review of all the facilities that will be impacted by additional growth, including those already discussed in the General Plan or Capital Improvements Plan. This task will require close coordination with all appropriate Town departments.

- 3A **Survey/Interview Town Staff:** DTA shall survey/interview Town staff to review projected facilities in the Town, along with major equipment needs, the timing at which improvements will be needed, and any physical data that would assist in developing the costs estimated below in Subtask 3C. Based upon the results of the surveys and interviews, DTA will verify and, if appropriate, expand the list of new facilities found in the General Plan or Capital Improvements Plan to be included within the fee program for the Town.
- 3B **Facilities List:** Based on the information collected in Subtask 3A, DTA shall prepare a facilities needs list that details the new facilities and equipment to serve new development in the Town. Prior needs lists, inventories, and IFFP(s) will be reviewed and discussed with the Town to maximize accuracy and strategic capital needs.
- 3C **Review Cost Estimates:** DTA's engineering and technical staff will, as necessary, consult with Town department heads and/or engineering staff or equivalent to ascertain and understand in-house cost data for existing and projected facilities and equipment, review and/or refine existing cost data, examine major sources of revenue to fund the construction of new public facilities, and provide a proportional estimate between projected costs for new facilities and estimated revenue from mitigation fees and other sources.
- 3D **IFFP Development:** DTA shall develop IFFPs for General Government Services and Parks and Recreation. Each IFFP shall establish a service standard, create an inventory of existing facilities, determine the method of financing existing facilities, assess excess capacity, identify additional facilities needed at present, and determine the method of financing needed facilities.

Deliverables: Draft IFFPs for General Government Services and Parks and Recreation and Revised Draft IFFPs Following Receipt of Town Comments

Task 4 – Develop Methodology for Calculating New Fee Amounts

This task entails developing the methodology used to establish the fee amount for each fee component to the extent appropriate. There are two critical issues that must be considered in developing a fee program. The fee program must generate revenues in a timely manner and the methodology must meet the nexus or benefit requirements of the Impact Fees Act. It is critical that any fee established be legally defensible.

DTA's Fee Study methodology must meet the nexus or benefit requirements of the Impact Fees Act, which requires that there be a nexus between the fees imposed, use of the fees, and development projects on which the fees are imposed. Furthermore, there must be a relationship between the amount of the fee and cost of the improvements. Implicit in these requirements is a stipulation that a public agency cannot impose a fee to cure existing deficiencies in public facilities or improve public facilities beyond what is required based on the specific impacts of new development. The benefit methodology established in this task will be documented in the Final Report.

DTA will recommend a Fee Expenditure Plan to ensure that projects can be fully funded and implemented within any required time limits for expenditures of such funds and possible flexibility to allow collected fees to be used to provide the Town with a match for grant applications. Finally, the memo will include recommendations for methodology and next steps. Upon review and discussion by Town staff, a methodology will be selected.

Deliverable: Memo Summarizing the Fee Methodology Options

Task 5 – Determine Fee Levels

This task entails calculating the fee amounts based upon the dwelling unit and commercial/industrial development projections completed in Task 2, facilities needs and costs determined in Task 3, and methodology selected in Task 4.

5A Calculate Recommended Fee Amounts: DTA shall calculate fees for the Town by inputting the data compiled under the preceding tasks and computing each fee to be levied. This work will be done in a spreadsheet format that can be updated annually. **DTA will also evaluate this data in comparison to surrounding and comparable jurisdictions so as to arrive at comparable and acceptable fee levels.**

5B Document Fee Derivation: DTA shall document the methodology utilized for the fee calculation model that can be understood by the Town and public. DTA shall prepare written statements documenting the validity of the methodology for deriving each of the fees for the Town. These statements will be made to meet the requirements of the Impact Fees Act and documented in the Final Report discussed below.

Task 6 – Prepare Draft and Final Reports

This task entails the preparation of the Draft and Final Reports for consideration by the Town Council and Town staff.

6A Based on the work completed in Tasks 1-5, DTA will prepare the Draft Report for review and consideration by Town staff. The Draft Report will be prepared under the standards of the Impact Fees Act and is expected to include an executive summary, population projections, a

facilities and improvements list, areas of benefit (if applicable), fee calculations, recommended fee levels, and the suggested process for keeping fees current. The report shall include the required written certifications pursuant to the Impact Fees Act, including statements attesting to the following:

- Each IFFP includes only the costs of public facilities that are allowed under the Impact Fees Act, actually incurred, and projected to be incurred or encumbered within 6 years after the day on which each impact fee is paid; and
- The enclosed impact fee analysis includes only the costs of public facilities that are allowed under the Impact Fees Act and does not include the costs of operation and maintenance of public facilities.

6B Prepare Final Report: Based on the incorporation of Town staff comments on the Draft Report, DTA will prepare the Final Report for presentation to the Town Council and Town staff.

Deliverables: Draft and Final Reports

Task 7 – Outline Tasks Required for the Implementation and Administration of the Fee Program

DTA will prepare a list of tasks required of the Town once they have adopted their new fee program. These tasks include the determination of actual fee levels if the Town decides not to impose the maximum fee levels allowed under the Fee Study, the implementation of the fee credit program, and other issues the Town may face when carrying out the fee program. In addition, DTA shall prepare a Draft Ordinance to adopt the fee program, subject to review and approval by the Town's legal counsel.

Deliverable: Draft Ordinance

Task 8 – Attend Up to Four (4) Additional In-Person Meetings, Plus Regular Virtual Meetings for Bi-Weekly Updates

This task entails attendance at a total of five (5) in-person meetings/workshops with Town staff, focus groups, stakeholders, and the Town Council to present information regarding the status of the impact fee program update, draft study, and Final Report to obtain input. DTA will also be prepared to lead meetings and workshops with selected groups to gain better project understanding, gauge community sentiment, and determine the key objectives. During these meetings, DTA will consider community and stakeholder input. For this purpose, DTA will develop handouts for these meetings that summarize the findings and analysis from the Public Review Draft. DTA staff shall also schedule standing conference calls (i.e., bi-weekly) with Town staff to stay on track with tasks and deliverables, to the extent allowable under the proposed maximum budget.

D Information to be Provided by the Town

DTA requests that the following information be provided by the Town at no charge and in a timely manner such that the project does not extend beyond 6 months from the date of authorization to proceed:

- Identification of offsetting revenue sources to fully understand financing options;
- The Town's General Plan, any Specific/Master Plans, Development Agreements, and data regarding existing entitlements;
- To the extent available, detailed description of the proposed public facilities, including the facility name and number of square feet, acres, etc. (as applicable for each type of facility);
- Inventory of completed facilities within the Town, including type, size, and location of facility;
- Cost estimates for proposed facilities (DTA anticipates that the Town's cost data and estimates will be reviewed by DTA staff and discussed with Town staff);
- Existing Town Fee Ordinances and/or Resolutions, as applicable, and administrative decisions related to permitting, building, and the development community; and
- Identification of any committed revenue sources pledged to fund proposed facilities.

E Tentative Project Schedule

DTA's tentative schedule of tasks for a DIF program/Fee Study is outlined below. Given the Town's desired project timeline, this timeline of events can and will be completed within the proposed time frame according to the Town's specifications. **The firm shall provide ongoing communication, education, and outreach throughout the duration of the project. DTA is able to begin work with minimal notice.**

Table 1: Proposed Schedule

| Task | Description | Weeks 1 to 5 | Weeks 6 to 9 | Weeks 10 to 13 | Weeks 14 to 18 | Weeks 19 to 22 | Weeks 23 to 25 | Week 26 |
|---------|---|--------------|--------------|----------------|----------------|----------------|----------------|---------|
| 1 | Development of Project Strategy and Kickoff Meeting | | | | | | | |
| 2 | Develop Population and Demographic Projections | | | | | | | |
| 3 | Review Facility/Capital Needs and Levels of Service | | | | | | | |
| 4 | Develop Methodology for Calculating New Fee Amounts | | | | | | | |
| 5 | Determine Fee Levels and Generate Cash Flow Analysis | | | | | | | |
| 6 | Prepare Draft and Final Reports | | | | | | | |
| 7 | Outline Tasks Required for the Implementation and Administration of the Fee Program, Including the Preparation of a Draft Ordinance | | | | | | | |
| 8 | Attend Four (4) Additional In-Person Meetings and Virtual Meetings, Plus Regular Virtual Meetings for Bi-Weekly Updates | | | | | | | |
| Ongoing | Communication, Education, and Outreach of Project | | | | | | | |

2 FIRM AND STAFF QUALIFICATIONS

A Firm Qualifications

A.1 Firm Overview

DTA is a national public finance and urban economics consulting firm specializing in infrastructure and public services finance. Our firm, which provides public finance consulting services to both public and private sector clients, has offices in Irvine, San Francisco, San Jose, and Riverside, California, as well as Dallas and Houston, Texas, Raleigh, North Carolina, and Tampa, Florida. Additional information on DTA is available on our website (www.FinanceDTA.com).

DTA's client contact and interaction continue beyond the basic deliverables. DTA is a customer and community-centric firm committed to excellence, quality products, and an open and interactive communication environment. We employ these practices in the workplace, in cities, counties, and towns, and with the many clients that we have served for 40 years. **DTA realizes that every client, like every person, is a distinct entity best understood and served in a direct and collaborative manner.**

DTA serves clients in small towns, medium-sized cities, and larger municipalities. Our service philosophy is three-pronged: we strive to know our customers, understand the communities we're privileged to serve, and always provide the best care, advice, and products. At DTA, we also understand that every project is different, and every outcome is special to our team. Our values of accountability, integrity, and excellence support all work performed. **We create strategies to guide and implement impactful public finance solutions.**

DTA is experienced in mapping, modeling, and public communication through small to mid-size municipal clients. More importantly, DTA is able to perform across operational departments, matrix strategies, and reporting environments in order to support the organization. This is done with a thorough understanding of the important and necessary schedules and deadlines.

Since its formation in 1985, DTA has assisted over 3,000 public and private sector clients in meeting their infrastructure and public services goals. DTA's consulting services include the following:

- **Public infrastructure and public services financing strategies;**
- Public-private partnerships;
- Assessment engineering and special tax consulting;
- Annual administration of ADs, CFDs, SAAs, and PIDs;
- Fiscal and economic impact analyses;
- **DIF studies and user fee studies;**
- Water and wastewater rate studies; and
- Tax Increment Financing ("TIF") in Florida, New Mexico, Nevada, North Carolina, South Carolina, Texas, Utah, and other states.

DTA has also **planned and implemented Public Facilities Financing Plans ("PFFPs")** that have ranged from the quantitative analysis of a single financing mechanism for an individual facility to the preparation of a comprehensive financing plan covering multiple facilities and public services through a series of financing mechanisms. Our financial analyses provide public officials, landowners, and other interested parties with the level of information needed to make fully

informed decisions regarding land use, infrastructure, and public services financing issues. DTA staff has extensive experience working with various stakeholder groups, including public agency legislative bodies, public agency municipal staff, residents, local chapters of the Building Industry Association ("BIA"), local Chambers of Commerce, and other interested parties.

DTA has provided public finance consulting services to virtually every major city and county in the State of California and completed consulting assignments for more than 3,000 clients in 26 states, including Florida, North Carolina, South Carolina, and the Southeast. DTA has also provided public finance consulting services for over 325 fire protection districts, school districts, and water districts.

We understand cost of capital, operationalize the best options, and present you with the staff that works "on the ground" in your state to complete any project of any size and any complexity. **Notably, in Utah, DTA recently provided financial advisory and assessment engineering services to the newly-created Benloch Ranch Homeowners Association during the formation of an improvement association and issuance of the first series of debt, totaling \$33.7 million.** Benloch Ranch is a master-planned community, is in unincorporated Wasatch County and near several significant outdoor recreational venues, including Jordanelle State Park, Park City Mountain Resort, Deer Valley Resort, and Utah Olympic Park (which hosted a variety of events during the 2002 Winter Olympics). The development is planned to consist of approximately 2,300 acres of land and planned to include over 2,100 units at full build-out. The initial special charge will be assessed on 540 Phase 1 residential units.

Perhaps DTA's most outstanding qualification is the dedication and loyalty of our senior employees, many of whom have worked at DTA for 15 years or more and are available should any unique situations arise. **In 40 years of work establishing over 2,000 financing districts and bond programs, DTA has never been sued.** Our quality control is one of the key components in ensuring our firm's success. DTA continues to seek innovative solutions and refine our work product to better serve and protect our clients.

A.2 DIF-Specific Experience

DTA has been performing public facilities fee consulting services for over 38 years, since 1987. We have extensive experience preparing DIF studies that have withstood legal scrutiny to the extent that none of our prior studies have been subject to any type of litigation. DTA has prepared approximately 700 fee justification studies to date for a variety of public improvements, including transportation, water, sewer and flood control facilities, fire protection districts, fire and police stations, parks, libraries, school facilities, and other types of infrastructure.

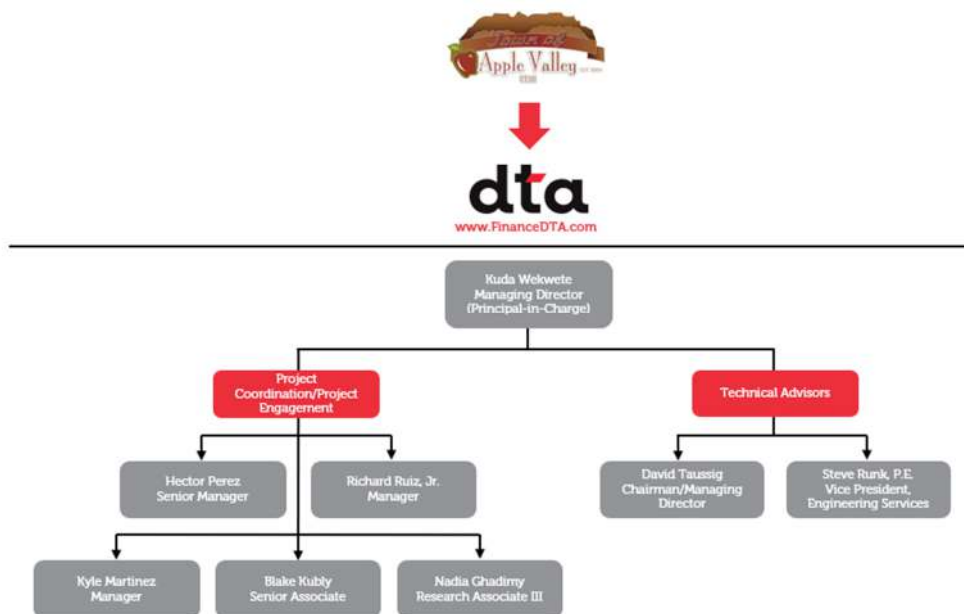
A partial list of the municipal clients whom we have completed impact fee studies for in California in recent years is provided below. **DTA is also currently involved in impact fee engagements in Arizona, Arkansas, Illinois, New Hampshire, New Mexico, North Carolina, South Carolina, and Florida, including the City of Delray Beach, City of Riviera Beach, City of Plantation, Hillsborough County, and Jefferson County.**

- City of Anaheim;
- City of Blythe;
- City of Brawley;
- City of Calexico;
- City of Campbell;
- City of Cathedral City;
- City of Chino;
- City of Chino Hills;
- City of Desert Hot Springs;
- City of Escalon;
- City of Firebaugh;
- City of Fontana;
- City of Fowler;
- City of Glendale;
- City of Hesperia;
- City of Ione;
- City of Kingsburg;
- City of Lakeview;
- City of Live Oak;
- City of Los Banos;
- City of Napa;
- City of Palo Alto;
- City of Pasadena;
- City of Paso Robles;
- City of Perris;
- City of Red Bluff;
- City of Redlands;
- City of Reedley;
- City of San Francisco;
- City of San Luis Obispo;
- City of Santa Ana;
- City of Soledad;
- City of South San Francisco;
- City of Tustin;
- City of Victorville;
- County of Colusa;
- County of Fresno;
- County of Kings;
- County of Riverside;
- County of San Bernardino;
- County of San Francisco;
- County of San Luis Obispo;
- County of Santa Barbara;
- County of Santa Clara Fire Department;
- County of Shasta;
- County of South Santa Clara Fire District;
- County of Yuba;
- Town of Loomis;
- Town of Mammoth Lakes;
- Beaumont Cherry Valley Recreation and Parks District;
- Denair Community Services District;
- El Dorado Hills Community Services District;
- El Dorado County Fire District;
- El Dorado Hills Fire Department;
- Jurupa Area Recreation and Park District;
- San Geronio Memorial Hospital;
- San Geronio Pass Water Agency; and
- South Yuba Transportation Improvement Authority.

B Key Personnel Qualifications

DTA has assigned personnel to this project who bring experience and technical expertise to each unique element of study. Our team organization is illustrated below. Project roles of our key team members are described below and followed by professional resumes. All personnel will be available full-time (100%) for the duration of the project. **DTA does not anticipate employing subconsultants for any portion of this engagement.**

Figure 1: Team Organization Chart



DTA has assembled a project team for the Town with the breadth of experience required to provide impact fee consulting services in a professional and timely manner. **This project would be primarily handled out of DTA's Dallas office.** Mr. Wekwete will serve as the Principal-in-Charge of DTA's project team and handle primary account responsibilities for this engagement. He will attend meetings as necessary and supervise all project staff.

Mr. Perez and Mr. Ruiz will be the Town's primary points of contact throughout this engagement. They will manage the work of DTA's project team, including leading data collection efforts, directing the development of our technical model, providing senior-level analysis, reviewing progress and work products with Town staff and community groups, presenting study findings at project meetings, and finalizing study documentation. Mr. Perez and Mr. Ruiz will be assisted in these tasks by other support staff.

Mr. Taussig will provide technical advisory services related to elements of the Fee Study, as needed, and oversee all quality assurance and quality control measures. Mr. Runk will provide engineering expertise, assist in the selection of facilities to be included on the facilities needs list, prepare and/or review facilities cost estimates, and contribute to the apportionment analysis of specific facilities to be included in the fee program.

Key personnel will be available to the extent proposed, or designated by the Town, for the duration of the project and no person designated as "key" to the project shall be removed or replaced without the prior written concurrence of the Town. In addition, DTA is not behind schedule or past the completion date for any active projects and has a long history of delivering projects on a timely basis and adhering to agreements.

DTA has an enviable reputation for producing high-quality work in a quick and efficient manner to correspond with even the most aggressive project schedule. DTA's clients also receive high levels of personal attention from senior staff, with a Managing Director, Senior Vice President, or Vice President always available to meet with public agency staff and other groups.

B.1 DTA Team Resumes

David Taussig

Chairman/Managing Director | David@FinanceDTA.com

Project Role – Technical Advisor



Mr. Taussig has over 45 years of experience in the fields of real estate finance and urban economics. His areas of expertise include municipal finance programs for infrastructure and public facilities development, fiscal and redevelopment impact analyses, and land development project feasibility studies **across many states and cities, including the States of Arizona, California, Florida, South Carolina, Tennessee, and Utah.**

Mr. Taussig has an extensive background in computerized financial analyses. Since founding DTA in 1985, Mr. Taussig has developed several state-of-the-art analytical methods and modeling approaches, in addition to directing the formation of over 1,000 public financing districts and subsequent sale of tax-exempt municipal bonds. These districts have funded public infrastructure and services for many types of residential and non-residential development and included several hundred master-planned communities built throughout California and in several other western states. Mr. Taussig's work has involved both the preparation and implementation of financing plans and his public sector clients have included virtually every major urban county and city within California and hundreds of special districts. He has provided similar consulting services to many of the largest land development firms in the State of California. The financing programs implemented by Mr. Taussig have ranged from land-secured CFDs to redevelopment tax increment programs and lease revenue-based Certificates of Participation. He is also responsible for DTA's successful efforts related to funding opportunities under various tax credit programs.

Mr. Taussig has also overseen the preparation of numerous feasibility and impact studies involving computerized analyses of project cash flows and/or impacts on public agencies and landowners. He has assumed project management responsibilities for several dozen Assembly Bill ("AB") 1600 DIF justification studies, including recent studies prepared on behalf of the Cities of Blythe, Coachella, Colton, Desert Hot Springs, Fontana, Live Oak, Paso Robles, Perris, Red Bluff, San Luis Obispo, Torrance, and Tustin and the Counties of Colusa, Riverside, and Santa Barbara. He has also handled the preparation of over 100 fiscal impact studies utilized by public agencies to determine the impact of new development or annexations on a municipality.

Mr. Taussig was previously employed for 6 years by Mission Viejo Company ("MVC") where, as the Manager of Housing and Community Development, he was involved in the planning and financing of two planned communities encompassing over 50,000 homes. Mr. Taussig handled a substantial portion of MVC's mortgage and infrastructure financing during that period. He also worked for 5 years in the public sector as the Administrator of a federal housing and community development program and as a Land Use Planner. Mr. Taussig's educational background includes a master's degree in city planning from the University of California at Berkeley and B.A. in economics from Cornell University. He received full certification from the American Institute of Certified Planners in 1982.

Mr. Taussig and the firm are a registered Municipal Advisor with the SEC/MSRB. He holds a Series 54 license as a Principal Municipal Advisor and Series 50 license as a Municipal Advisor under regulations promulgated by the SEC and MSRB. Even after 45 years of experience in the industry, to this day, he continues to seek innovative answers to the industry's biggest questions and contributes to the development of public finance and development-related legislation. In addition, he is an active member of the Urban Land Institute's ("ULI's") National Council for Public-Private Partnerships ("NCPPP") and advocates and facilitates the formation of public-private partnerships at federal, state, and local levels.

Kuda Wekwete

Managing Director | Kuda@FinanceDTA.com

Project Role – Principal-in-Charge

Since joining DTA in 2005, Mr. Wekwete has been involved in all aspects of the formation and implementation of special districts to fund infrastructure and services, as well as the sale of over \$300 million in CFD bonds, **across many states and cities, including the States of Florida, South Carolina, Texas, and Utah.** His work has involved the preparation of tax spreads and overlapping debt analyses for the formation and/or sale of bonds for over 175 special districts established throughout California. In this role, Mr. Wekwete has prepared Rates and Methods of Apportionment ("RMAs"), CFD and Engineer's Reports, and documents required for the formation of CFDs, sale of property, and annual levying of special taxes. He has also been responsible for preparing PFFPs involving CFDs and other public finance mechanisms.



In addition, Mr. Wekwete has been actively involved in the preparation of dozens of fee studies, especially in the area of transportation infrastructure costing, and apportionment of these costs over various land use types based on benefit criteria. His engineering background has enabled him to assist DTA's Vice President of Engineering Services in applying a variety of apportionment methodologies to the development of fee studies and establishment of Benefit ADs for public sector clients. **Mr. Wekwete's recent work on DIF studies has included engagements for the Cities of Colton, Desert Hot Springs, Fontana, Paso Robles, Perris, and Torrance and the Counties of Riverside, San Bernardino, San Luis Obispo, and Santa Barbara, among others.**

Mr. Wekwete also has experience in the preparation of Fiscal Impact Reports ("FIRs"), tax increment analyses, and PFFPs and has performed due diligence services and developed disclosure documentation for land purchasers, public agencies, and lenders.

Mr. Wekwete received his B.S. and M.S. in operations research and industrial engineering from Cornell University and Columbia University, respectively. He also holds a Series 50 license as a registered Municipal Advisor with the SEC/MSRB under rules promulgated following the Dodd-Frank Act in 2010.

Steve Runk, P.E.

Vice President, Engineering Services | Steve@FinanceDTA.com

Project Role – Engineer (State License Number C23473 – California Registered Civil Engineer)



Mr. Runk has over 45 years of experience in the design and construction management of major civil engineering projects, including roadways, bridges, sewer and water improvements, and flood control facilities, grading for public works projects, and construction of commercial and industrial buildings. Mr. Runk's specific responsibilities have included design, quality control, specifications, estimates, construction bid packages, construction coordination and management, cost analyses and cost control, scheduling, manpower forecasting, staffing, and marketing. He has also assisted public agencies and developers in the procurement of funding from the California Department of Transportation ("Caltrans") and other federal and state agencies. Mr. Runk has provided engineering services to municipalities **across many states and cities, including the States of Arizona, Arkansas, Florida, New Mexico, South Carolina, and Utah.**

Mr. Runk has a proven track record of meeting schedules and adhering to budgets. Since joining DTA in 2000, he has worked with local agencies to resolve community issues and negotiate scope changes with contractors to ensure the timely and satisfactory completion of construction projects. He has also acted as the Project Manager for the establishment of ADs and preparation of numerous AB 1600 DIF justification studies. Mr. Runk specializes in preparing assessment apportionment formulas and fee studies for roads, storm drains, and water and wastewater facilities. **He has been involved in preparing needs lists and apportioning facilities costs for many of DTA's AB 1600 studies, including those in the Cities of Anaheim, Brawley, Coachella, Chino Hills, Hesperia, Paso Robles, San Luis Obispo, Tustin, and Victorville, as well as the County of San Bernardino and a number of water districts, including the San Gorgonio Pass Water Agency. He was also closely involved in DTA's previous work as the AB 1600 consultant for the County of Riverside.**

Prior to joining DTA, Mr. Runk, as the Senior Construction Manager for Holmes & Narver, Inc., successfully completed the construction of the SR-41 Freeway in Fresno County, which was the County's first Measure "C" sales tax-funded freeway. Prior to this project, Mr. Runk successfully completed the construction of the SR-71 Freeway in Chino/Chino Hills, California. This \$98 million project was the first Measure "M" sales tax-funded project for the San Bernardino Associated Governments ("SANBAG"). Mr. Runk's responsibilities on both projects included contract management, quality control, public relations, cash flow analyses, project closeout, and compliance with federal and State funding requirements.

Previously, Mr. Runk held positions with various public and private engineering entities in which he delivered projects requiring a wide variety of engineering expertise. He holds a B.S. in engineering from the University of California at Los Angeles and an M.S. in civil engineering from California State University at Long Beach. Mr. Runk is a registered Civil Engineer in the State of California.

Hector Perez

Senior Manager | Hector@FinanceDTA.com

Project Role – Project Coordination

Hector Perez has significant senior management experience in municipal government, health care, resource development, and the private and public sectors. For instance, he has experience with assessing and resolving community development issues, such as capital projects, water/wastewater capacity, sports complexes, traffic impacts, and neighborhood expansions. Mr. Perez has directed strategic planning and financial management responsibilities, budgeting strategy for facilities, technology, and capital expenditures for medium to larger organizations, including public agencies with operating budgets of \$400 million and 3,000 employees. He has supervised construction projects that have included architects, construction companies, space planners, scheduling consultants, and engineers while providing day-to-day budget direction and management.



Mr. Perez also has extensive experience working with municipal government staff members and departments (including countywide public safety operations), volunteers, community activists, regulatory agencies, elected officials, and law enforcement. He has worked with numerous law enforcement offices to achieve staffing levels, inventory modernization, and neighborhood coverage throughout a comprehensive budget. In addition, Mr. Perez worked for a large county in Florida supporting the administration and commissioners with growth management issues, such as roadway expansion, building permits, and related DIFs. **He is responsible for projects in Florida, North Carolina, Texas, South Carolina, and the Southeast consisting of impact fees, PIDs, Special Assessment Districts, and their administration for developers and cities/counties.**

Mr. Perez has a bachelor's degree from Florida State University and a graduate certificate in non-profit management and innovation from the Sykes Graduate Business School at the University of Tampa. In addition, he completed the Certified Financial Planning Course Program at North Carolina State University. Mr. Perez is a member of American Water Works Association ("AWWA") and has the experience and work history of understanding and applying the best practices of AWWA and Water Environment Federation ("WEF") in rate studies.

Richard Ruiz, Jr.

Manager | Richard@FinanceDTA.com

Project Role – Project Engagement



Mr. Ruiz has a background in econometrics and industrial organization. Since joining DTA, he has been involved in the formation and administration of numerous CFDs, ADs, and LLDs throughout California and several other states, including Florida, North Carolina, Texas, and Utah. His responsibilities related to these projects have included the development of tax spread proforma analyses and preparation of overlapping debt analyses. In addition, while at DTA, he has participated in a variety of projects, including fiscal and economic impact studies for cities and counties throughout California, school district rezoning projects, city/county annexation projects, user fee calculations, and living wage analyses.

Mr. Ruiz also has extensive experience working on the preparation of DIF justification studies for cities and counties in California and numerous other states, **including Arizona, Arkansas, Florida, South Carolina, and Utah.** His responsibilities during the impact fee justification and apportionment analysis process for each respective project include the preparation of capital improvement and public facilities needs lists, data collection, the development and modification of the DIF Report model, the production of a written report, and interactions with city, county, and district staff and key stakeholders. Mr. Ruiz' recent work on DIF studies in California has included engagements for the Cities of Chino Hills, Colton, Coronado, Cypress, Daly City, Desert Hot Springs, Fontana, Fowler, Inglewood, Ione, Manteca, Mammoth Lakes, Norco, Palo Alto, Perris, San Jose, Soledad, Torrance, Upland, Victorville, and Yucaipa and the Counties of San Luis Obispo and Santa Barbara, among others, in addition to the El Dorado Hills Fire Department. **East coast projects include Pickens County, South Carolina, City of Fayetteville, Arkansas, City and County of El Paso, Texas, City of Laconia, New Hampshire, Village of Oswego, Illinois, and City of Riviera Beach, City of Delray Beach, City of Plantation, Hillsborough County, and Jefferson County, Florida.**

Prior to joining DTA, Mr. Ruiz spent 14 years with an energy economics consulting firm that focused on economic and market research studies, mergers and acquisitions analyses, market entry research strategies, and economic due diligence projects for companies seeking equity funding. He has a degree in economics from California State University at Long Beach with a concentration in public finance. Mr. Ruiz is a member of AWWA and has the experience and work history of understanding and applying the best practices of AWWA and WEF in rate studies. He is also a Professional Member with the Institute of Transportation Engineers ("ITE").

Kyle Martinez

Manager | Kyle@FinanceDTA.com

Project Role – Project Engagement

Since joining DTA in 2016, Kyle Martinez has been actively involved in the formation, implementation, and administration of CFDs, ADs, improvement associations, and other special assessments and districts throughout the **States of Arizona, California, Florida, Utah, and the Southeast.** Her work has involved the preparation of RMAs, overlapping debt analyses, Engineer's Reports, and apportionment studies. She has experience in the calculation of special tax levies and assessment installments, in addition to conducting relevant parcel research, ownership and prepayment analyses, and continuing disclosure obligations. Ms. Martinez oversees special assessment administration and the levy of approximately \$80 million annually in the County of Santa Clara, California, alone. Ms. Martinez has worked on nearly one dozen fiscal and economic impact analyses for cities and counties. Her responsibilities during these analyses for each respective project include evaluating the revenues generated by a development project as associated with the costs and determining the direct, indirect, and induced employment and economic benefits generated by new development.



Ms. Martinez has extensive experience working on the preparation of DIF and capacity fee studies for cities, counties, and special districts, as well as the analysis and review of rate calculations for water/wastewater capacity fee studies throughout North Carolina. Her

responsibilities include the analysis of capital improvement and public facilities needs lists, inventories, and asset lists, data collection, the development of DIF Report models, the preparation of written reports and corresponding staff reports, and collaboration with city and county staff and key stakeholders. Ms. Martinez' recent work on DIF studies in California has included engagements for the Cities of Campbell, Palo Alto, San Jose, and Soledad and the Counties of Kings and Shasta, among others. The City of Campbell's fee study focused on parkland acquisition, while the City of Palo Alto's fee study featured Parks, Library, and Community Center Fee updates with a parkland acquisition component. Ms. Martinez is also currently supporting DTA teams on impact fee updates for the Town of Queen Creek, Arizona, Hillsborough County, Florida, and the City of Riviera Beach, Florida.

Ms. Martinez received her Bachelor of Arts degree in communications with an emphasis in journalism from California State University, Fullerton.

C References

DTA has completed consulting assignments for more than 3,000 clients in 26 states, including Arizona, California, Colorado, Florida, New Mexico, North Carolina, South Carolina, Tennessee, and Utah. Listed below are four (4) references for DTA's recent work involving public finance consulting services for cities and counties nationwide. DTA has a long history of delivering projects on a timely basis and adhering to agreements. We encourage you to contact our references to learn firsthand how well DTA staff meets the needs of our clients.

C.1 Numerous Special Districts in Utah

Table 2: Reference Information

| | |
|-------------------|--|
| Location | State of Utah |
| Contact Name | Brennen Brown, Managing Director, Public Finance |
| Address | 95 S. State St., Ste. 1500, Salt Lake City, UT 84111 |
| E-mail Address | (801) 994-3166 |
| Phone Number | BSBrown@DADCo.com |
| Key Project Staff | Kuda Wekwete (Project Manager), Jonathan Saba (Task Specialist), and Kyle Martinez (Task Specialist) |
| Date of Service | January 2020-Ongoing |

DTA has assisted with the formation of a number of districts in the State of Utah, including Benloch Ranch Improvement Association Nos. 1 and 2, Brixton Park Improvement Association No. 1, Treehouse Park Improvement Association No. 1, Wood Ranch Public Infrastructure District No. 1, Black Desert Public Infrastructure District No. 1, and Three Bridges Public Infrastructure District No. 1, all of which are bonded districts. Additionally, DTA currently administers these districts.

DTA's Improvement Area and Public Infrastructure District administration responsibilities include parcel database development, maintenance, and updates; the determination of the annual budget, including detailed financial reconciliation of prior year revenues and expenditures and assessment installment calculations; preparation of payoff calculations and bond call redemption instructions; coordination with the trustee; the management of

the billing and collection of assessment installments; and quarterly reporting requirements.

C.2 City of Greeley

Table 3: Reference Information

| | |
|--------------------------|--|
| Location | City of Greeley, CO |
| Client Contact | Tyra Litzau, Director of Finance |
| Address | 1100 10th Street, Greeley, CO 80631 |
| E-mail Address | Tyra.Litzau@GreeleyGov.com |
| Phone Number | (970) 381-4777 |
| Key Project Staff | Kuda Wekwete (Principal-in-Charge) Hector Perez (Project Manager), Kyle Martinez (Task Specialist), and Richard Ruiz (Task Specialist) |
| Project Dates | February 2025-Present |

DTA is conducting a comprehensive review of the City of Greeley's development code and perform a DIF study. All work to be completed will satisfy the requirements of the Colorado Revised Statutes §29-20-104.5 (the "Impact Fees Act"). The Impact Fees Act-compliant DIF Nexus Study would recommend the appropriate fee justification methodology and fee levels to support specific types of City-selected capital facilities needed to serve new growth, in addition to including data collection and the assessment of short- and long-term needs. The City currently assesses on-time DIFs on new residential, office, industrial, and retail projects, including Transportation, Police, Fire, Parks, Trails, Stormwater Drainage, Water, and Sewer DIFs.

In addition to the Citywide impact fee study, DTA was hired to conduct a complex DIF for a regional catalyst project with over a billion dollars in investments. This project will be specifically related to the General Improvement District ("GID") that the City intends to form around the area that encompasses the future site of the West Greeley/Cascadia project. This is set to bring new development to West Greeley and will include an arena, a youth hockey center, a water park, a hotel and convention center, and retail and residential infrastructure. The study will be used to assess the GID impact fee's ability to assist in the funding of regional infrastructure needs. DTA will analyze the various factors, including the City's existing impact fees, utility costs, population projections, land use, regional infrastructure needs, and all other relevant factors, to recommend a sufficient yet equitable impact fee with demonstrated nexus.

C.3 Pickens County

Table 4: Reference Information

| | |
|--------------------------|---|
| Location | Pickens County, SC |
| Contact Name | Trad Julian, Planning Supervisor |
| Address | 222 McDaniel Avenue, Suite B-10, Pickens, SC 29671 |
| E-mail Address | TradJ@Co.Pickens.SC.US |
| Phone Number | (864) 898-5989 |
| Key Project Staff | Kuda Wekwete (Project Manager), Steve Runk (Engineer), Richard Ruiz (Task Specialist), and Hector Perez (Task Specialist) |
| Date of Service | July 2023-Ongoing |

In 2023, DTA was hired as a consultant by Pickens County, South Carolina, to provide a comprehensive study for the assessment and development of a County DIF program. The County does not currently have a DIF program and wanted DTA to determine the feasibility of implementing one. The purpose of the study was to evaluate and recommend appropriate fee justification methodologies and new fees with a legally supportable analysis based on current and projected demographics. The fees reviewed and recommended in this study included County Administration, Fire, EMS, Emergency Management, Roads and Bridges, Solid Waste, Library, Parks, and Sheriff's Department. A particular challenge in this fee study was that the County is in a region of the Country in which both the local government and developer communities are not very receptive to DIF programs.

C.4 City of Riviera Beach

Table 5: Reference Information

| | |
|--------------------------|---|
| Location | City of Riviera Beach, FL |
| Contact Name | Randy Sherman, Director of Finance and Administrative Services |
| Address | 600 W. Blue Heron Blvd., Riviera Beach, FL 33404 |
| E-mail Address | RSherman@RivieraBeach.org |
| Phone Number | (561) 845-4045 |
| Key Project Staff | Kuda Wekwete (Project Manager), Steve Runk (Engineer), Richard Ruiz (Task Specialist), Hector Perez (Task Specialist) |
| Date of Service | April 2021-Ongoing |

DTA updated the City of Riviera Beach impact fee schedule for parks, recreation, police, fire, library, and transportation services pursuant to Florida Statutes 163.31801 (the "Florida Impact Fees Act"). In addition, DTA reviewed Florida's 2021 impact fee legislation, House Bill ("HB") 337, to provide and recommend best outcomes and practices for the City. To determine these updated costs, DTA conducted a detailed review of the City's budgets, Comprehensive Plans, Capital Improvements Plans, Facilities Master Plans, strategic goals, and any additional expansion of services to the community. **The City has full confidence in DTA's approach to impact fee analyses. As a result, the City has rehired DTA to update the previous calculations and scope of work.**

APPENDIX A

Town of Apple Valley, UT
Request for Statement of Qualifications
Impact Fee Facilities Plan Services



**SAMPLE DATA
REQUEST FORM**

MEMORANDUM

September 9, 2025

To: Town of Apple Valley, UT
From: DTA
Subject: Data Request/Information Form for Impact Fee Facilities Plan Services

1. Documents/Data Request by DTA (some items may be available online) for Impact Fee Facilities Plan ("IFFP") Services, including IFFPs for General Municipal Services and Parks and Recreation:
 - Latest General Plan (of particular interest, Housing Element or Land Use Element);
 - Any Specific Plan and/or Master Plan information;
 - Development Agreements and data regarding existing entitlements;
 - Capital Improvement Plan ("CIP") (approved or under review);
 - Any existing Impact Fee Study, Ordinance, and Fee Schedule;
 - Latest Parks, Recreation, and Open Spaces Plans, if available;
 - Impact Fee Annual Reports/3-Year Reports;
 - Current account balances for fees collected to date;
 - Population and development statistics;
 - CIP data for Parks, Recreation, and Open Spaces Plans, in addition to the Park Facilities Master Plan;
 - Residential Building Permits for the last 3 years (if available);
 - Commercial Building Permits for the last 3 years (if available);
 - Details on planned development projects;
 - Identification of offsetting revenue sources to fully understand financing options;
 - Identification of any committed revenue sources pledged to fund proposed facilities;
 - Annual Comprehensive Financial Reports ("ACFRs") for the last 3 years; and
 - Debt Obligations Reports, if separate from the ACFR(s).
2. If available, please provide a list of specific facilities/improvements (and total estimated cost in 2025 dollars) to be funded by the municipal services impact fees. For each improvement:
 - Identify whether the improvement is listed in an approved planning document (e.g., General Plan, Specific Plan, or Master Plan) as a necessary facility to serve new development and, if so, list the specific document(s); and
 - If not listed in an approved planning document, please provide the rationale for the specified improvement and a listing of the Town's current inventory of similar improvements in operation in the Town.
3. If there isn't a list of specific improvements required for new development, please identify the required service standard. For each standard:
 - Identify the approved planning document(s) justifying such standards; and
 - Provide information on the existing standard (e.g., existing park acres per 1,000 residents, based on the current population). The Town may also provide necessary data for DTA to calculate/verify standards (e.g., for parks, an inventory of existing parks and associated acres).

For more information about this Data Request Form, please contact Hector Perez by e-mail at Hector@FinanceDTA.com or by phone at (919) 247-9449. Thank you!



www.FinanceDTA.com

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DALLAS, TX 75225
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Public Finance
Public-Private Partnerships
Development Economics
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